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SUPERMARKET BUSINESS

$6.00
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PART ONE
OF TWO PARTS

VOLUME 43/ NUMBER 2
FEBRUARY 1988

Toward the Computerized Store

Space Management Systems That Can Do It All

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Still-life photography by Peter Brauné. Other cover art courtesy of Information Resources Inc.
Additional graphics by Web Prep Corp.

SUPERMARKET BUSINESS Magazine (ISSN 0196-5700) is published monthly by Sosland Publishing Co., 25 W. 43rd St., New York, N.Y. 10036. Telephone: 212-354-5169. Circulated free of charge to grocery retailers and wholesalers. U.S. subscriptions $48 per year; Canada, $56 per year. Foreign subscriptions $66 (seamail), $212 (airmail), per year. Single copies $6 except Consumer Expenditures Study (September issue) $32 per copy. (Discount prices available on multiple purchases.)
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Second class postage paid at New York, N.Y., and additional mailing offices.

All circulation inquiries to: Circulation Dept., Sosland Publishing Company, 9000 W. 67th St., PO Box 29155, Shawnee Mission, KS 66201. Telephone (913) 236-7300.

BPA ABP Association Of Business Publishers, Inc.

SUPERMARKET BUSINESS

VOLUME 43
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PART ONE OF TWO PARTS
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TOWARD THE COMPUTERIZED STORE: SPACE MANAGEMENT SYSTEMS THAT CAN DO IT ALL/BOB HUGHES 25

New computerized space management systems not only show how a section should look, they can also provide the details on why this or that arrangement of product will reduce out-of-stocks and provide a better return on investment.

PRODUCE: FLORAL SHOPS ARE MAKING PROFITS BLOOM 35
DANIEL ELMAN

More supermarket retailers are realizing the profit potential that floral departments can provide. Once merely a modest adjunct to the produce department, today's floral sections are nothing to sneeze at.

VALUELAND FOODS HAS MORE THAN JUST A NEW NAME 45
KEVIN COUPE

In order to compete in its rapidly changing New England market, Valueland Foods itself had to change, from a warehouse to a modified upscale kind of store.

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COOKING UP A TAKE-OUT TRADE/LESLIE GILBERT 4A

In their ongoing efforts to capture the take-out dollar, more supermarket delis are offering a wider variety of microwavable, freshly prepared entrees.

IN MASSACHUSETTS, MAL'S MARKET GOES UPSCALE (SORT OF)/KEVIN COUPE 15A

Mal's Market tripled in size in three years. Now, to go along with that growth, it has slowly begun to upgrade its image.

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HOW NEW TECHNOLOGY IS CHANGING SHELF MANAGEMENT/DANIEL ELMAN 53

New space management systems can provide merchandisers with more than just pretty pictures. They can also provide pretty profitable merchandising blueprints.

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To keep dearly departed pets from getting under foot, a new company provides coffins for cats, dogs and other animal friends of the family.

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Rx FOR STRONGER PHARMACY SALES: MORE PERSONAL SERVICE

A new survey shows who's shopping at those burgeoning supermarket pharmacies and suggests some ways to build a healthy customer base.

BY BOB DIETRICH

If you have an urgent need to know the current priorities of supermarket store planners—don't ask. Just walk through the entrance of one of their newly opened prototypes and you'll find your answer.

Take, as an example, the Vons Pavilions stores that the Vons Grocery Cos. (El Monte, Calif.) is opening in the tremulous Los Angeles market. Planners have ceded leadoff positions in the traffic flow to video rental and pharmacy.

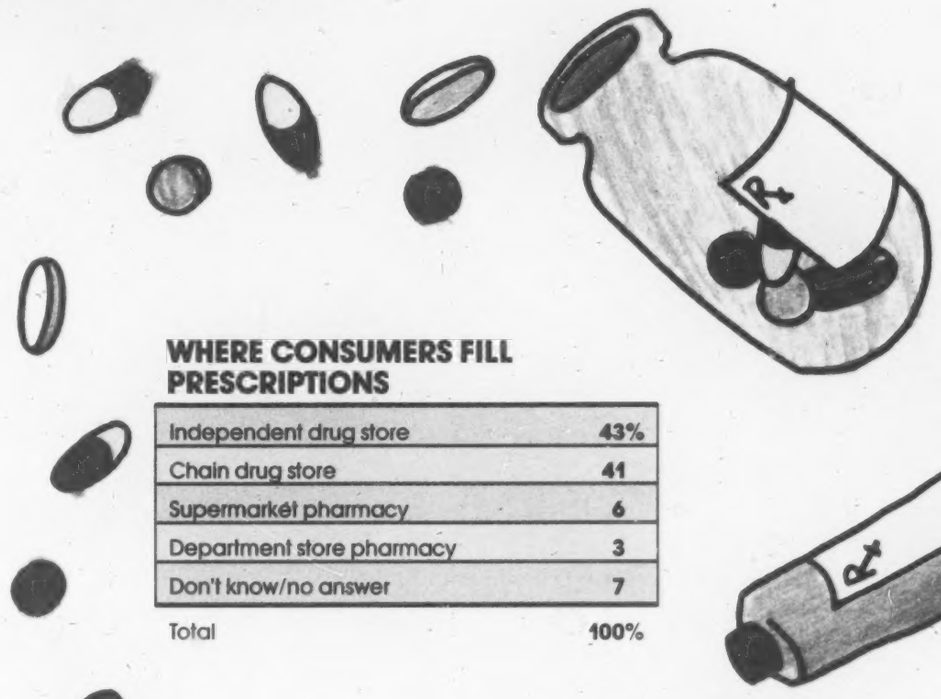
Obviously, the Vons planners have justified their choices on the basis of both current customer appeal and, more important, projected growth. These departments share one strong similarity—they not only bring the customer in, but they bring the customer *back in*, either to return the video or to pick up a prescription.

The service factor

What's more, both services foster that critical, across-the-counter contact with store personnel, which can help convert first-time customers into regulars. That's especially important when you consider that the pharmacy is the supermarket's direct connection to the single fastest-growing sector of the economy: health care.

Just how many pharmacies are there in U.S. supermarkets, who's patronizing them, and how much appeal do those instore pharmacies have compared to more traditional pharmacies?

The first part of the question was answered in SUPERMARKET BUSINESS's Census of Pharmacies (January 1987), which



WHERE CONSUMERS FILL PRESCRIPTIONS

Independent drug store	43%
Chain drug store	41
Supermarket pharmacy	6
Department store pharmacy	3
Don't know/no answer	7
Total	100%

EFFECT OF AGE AND REGION ON CHOICE OF PHARMACY

	Independent	Chain	Supermarket*	No Answer
BY AGE				
Under 30	36%	39%	15%	10%
30-39	38	46	9	7
40-54	41	45	6	8
55-64	50	36	9	5
65 and over	54	36	5	5
BY REGION				
Northeast	57	31	9	3
North Central	37	47	9	7
South	44	42	6	8
West	37	37	17	9

*Includes department stores.

counted approximately 3,150 supermarket pharmacies, in 10 percent of all supermarkets. As the pharmacies are necessarily located in larger outlets that can accommodate their average 380 square feet, the percent of total supermarket all-commodity volume (ACV) represented by stores with pharmacies is much greater.

Newly constructed supermarkets of various formats are usually vast enough to tuck a pharmacy comfortably into a corner, so it is reasonable to expect their incidence and influence to continue rising. This is especially likely as local regulations prohibiting pharmacies in supermarkets continue to erode, as recently occurred in Massachusetts with the passage of *laissez-faire* legislation for pharmacies.

Examining the patient

To justify their interest and investment in pharmacies, it's important (perhaps more so than for any other department) for supermarket executives to know who, demographically, the pharmacy customer is and how customers, or *patients*, as pharmacists prefer to call them, choose a pharmacy.

The results of a recent national survey of 2,000 representative consumers sponsored by Schering Laboratories provide an unprecedented insight into the relationship between the supermarket pharmacy and its patrons.

Among the participants in the survey who had recently had a new prescription filled, six percent said they had done so in a supermarket pharmacy, another three percent went to a pharmacy at a department store (such as K mart). The remaining business was almost equally divided between independent drugstores, which 43 percent of the participants had patronized recently, and chain drugstores, which 41 percent had patronized (see chart "Where Consumers Fill Prescriptions").

Among the many demographic factors the survey examined, two showed the greatest discrimination between those seeking a supermarket pharmacy and those making other choices: age and region.

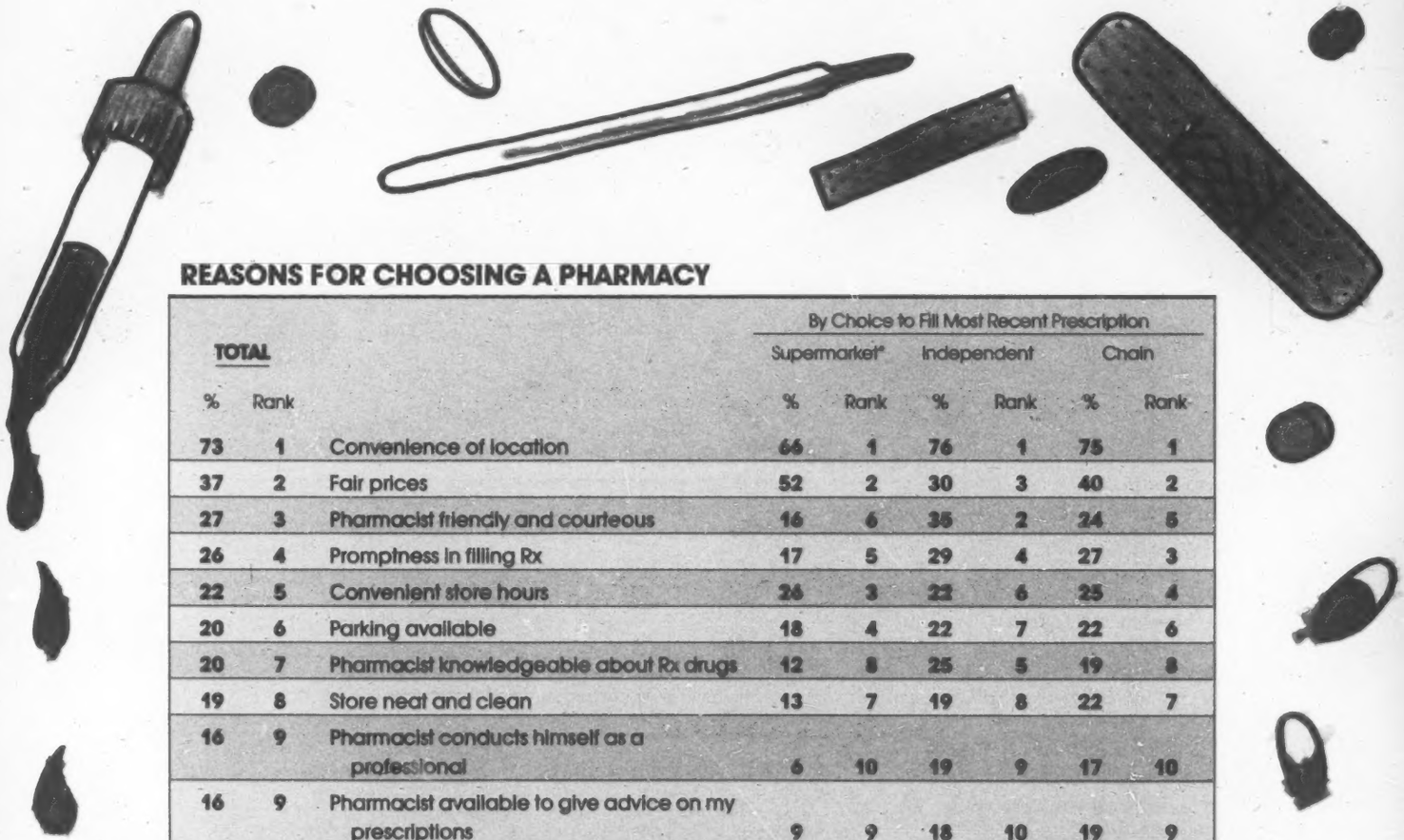
Younger prescription fillers, that is, those under 30, were three times as likely to take their prescription to the supermarket as were seniors 65 and over (see chart "Effect of Age and Region on Choice of Pharmacy").

One may surmise that those young enough to have started filling their own prescriptions in the last decade or so might find the supermarket as rational a place for doing so as for, say, buying a croissant or a pair of pantyhose.

Older patrons who came of age when a drugstore was a free standing enterprise with its own distinguishable persona (often including the sweet smell of chocolate syrup wafting over from the soda fountain) may be slower to cotton to the arrival of pharmacies under the supermarket roof. Obviously, it's in the enlightened self-interest of supermarket pharmacists to reach out to the store's older patrons and acquaint them with the professionalism of instore pharmacies.

Sheer availability of pharmacies in supermarkets in the western states may explain why 17 percent of those living in that region patronized a supermarket pharmacy when filling a prescription, a significantly higher incidence than in the other three regions. But we may also want to toss into the equation some measure of the West's willingness to experiment.

Other demographic determinants of behavior, such as sex, race and income reveal no clear cut patterns related to the use of supermarket pharmacies. The



REASONS FOR CHOOSING A PHARMACY

TOTAL			By Choice to Fill Most Recent Prescription					
			Supermarket*		Independent		Chain	
%	Rank		%	Rank	%	Rank	%	Rank
73	1	Convenience of location	66	1	76	1	75	1
37	2	Fair prices	52	2	30	3	40	2
27	3	Pharmacist friendly and courteous	16	6	35	2	24	5
26	4	Promptness in filling Rx	17	5	29	4	27	3
22	5	Convenient store hours	26	3	23	6	25	4
20	6	Parking available	18	4	22	7	22	6
20	7	Pharmacist knowledgeable about Rx drugs	12	8	25	5	19	8
19	8	Store neat and clean	13	7	19	8	22	7
16	9	Pharmacist conducts himself as a professional	6	10	19	9	17	10
16	9	Pharmacist available to give advice on my prescriptions	9	9	18	10	19	9
11	11	Has new prescription products available	3	11	14	11	11	11
8	12	Delivery service	1	12	12	12	5	12

*Includes department stores.

survey does show that what turns on a shopper who chooses a supermarket pharmacy can be quite different from what turns on someone opting for a chain or independent drugstore.

As in most surveys on preference among retail store outlets, convenience scored first among those asked (see chart "Reasons for Choosing a Pharmacy"). But as it's likely that most people can find various types of outlets within the same walking or driving distance, it's important to look beyond convenience and examine first those factors that are of greater importance to patrons of supermarket pharmacies than to patrons of other outlets.

The only factor cited by a substantially higher percentage of supermarket shoppers than other shoppers is fair prices. Price trails convenience by only 14 percentage points among supermarket patrons, compared to 35 points among chain drugstore customers and 46 points among independent drugstore customers. Some careful proselytizing by supermarkets among the price-sensitive could help draw new traffic.

Convenient store hours and availability of parking both rank *higher* among supermarket patrons, third and fourth, respectively, than among patrons of other pharmacies. This suggests that hours and parking can be strong hooks for supermarkets in attracting working women in search of one-stop shopping convenience.

Factors of less importance

Compared to those opting for an independent drugstore, those who chose a supermarket pharmacy placed less importance on the character of the pharmacist. Perceptions of pharmacists can be inferred from four of the factors shoppers cited in choosing a pharmacy:

☐ pharmacist is friendly and courteous,
☐ pharmacist is knowledgeable about prescription drugs,
☐ pharmacist is available to give advice on prescriptions, and
☐ pharmacist conducts himself as a professional.

Fewer than half as many supermarket pharmacy patrons as those who used independent pharmacies named these reasons as important. Those using chain drugstore pharmacies placed more importance on these factors, but not as much as those patronizing independents.

Looked at one way, people who place scant significance in the person of the pharmacist (including his credentials, personality and performance) don't mind shopping at a supermarket pharmacy. Looking at the flip side, it appears that people who concentrate on the qualities of the pharmacist are more likely to fill their prescriptions somewhere other than in a supermarket. Supermarkets that want to lure more trade for their pharmacies from current patrons of other outlets might consider placing greater emphasis on the person at the heart of the department, rather than on its hardware.

Loyalty to a pharmacist seems the precursor to loyalty to a pharmacy, as the highly phar-

CONSUMER LOYALTY TO PHARMACIES

Percentage of customers who report they always use the same pharmacy.

BY TYPE OUTLET CHOSEN TO FILL MOST RECENT PRESCRIPTION	
Independent drug store	90%
Chain drug store	84
Supermarket*	82
Total	86%

*Includes department stores.

WHO DELIVERS PRESCRIPTIONS TO CONSUMER

BY TYPE OUTLET CHOSEN TO FILL MOST RECENT PRESCRIPTION	Pharmacist	Clerk	Other	DK/NA
Independent drug store	60%	34%	5%	1%
Chain drug store	52	43	1	4
Supermarket*	60	40	—	—
Total	56%	38%	3%	3%

*Includes department stores.

INSTRUCTIONS FOR USE OF MEDICATION RECEIVED FROM PHARMACY PERSONNEL

	All Patients	By Type Outlet Chosen to Fill Most Recent Prescription		
		Independent	Chain	Supermarket*
RECEIVED INSTRUCTIONS ON:				
How often to take	41%	47%	34%	35%
How much to take/apply	43	52	36	34
How long to continue taking	36	43	29	27

*Includes department stores.

macist-conscious patrons of independent drugstores show the highest rate of loyalty to one pharmacy (see chart "Consumer Loyalty to Pharmacies"). Patrons of supermarket pharmacies confess the least loyalty.

The invisible pharmacist?

Supermarkets that decide to shine a brighter spotlight on the pharmacist himself appear to have a pretty good case to promote. Among those who had their most recent prescription filled in a supermarket pharmacy, 60 percent said that the pharmacist himself (rather than a clerk or someone else) gave them the prescription, a tie with that traditional bastion of service, the independent drugstore (see chart "Who Delivers Prescriptions to Consumer"). Chain drugstores trailed both at 52 percent.

The health care community is taking increasing notice of improper patient compliance (that is, when patients do not have their prescriptions filled, do not take the medication as directed, or do not have it refilled as indicated) and the negative effects of improper compliance of patients—effects that include poor health and even death. (In fact, this survey by Schering was designed to take the measure of, and help combat, the phenomenon.)

There are two authorities to whom patients look for advice on taking prescribed medications—the physician who prescribes the medication, and the pharmacist who fills the prescription. At the pharmacy level, pharmacists are more than twice as likely as clerks to give instructions to the patient when handing over the actual medication. Obviously it's in the best interests of both the supermarket pharmacist and his customers to take the time to hand over filled prescriptions personally, as much as time permits.

At present, supermarket pharmacies offer such advice as often as chain drugstores. About one-third of the time, consumers at supermarket pharmacies get instructions on how often to take the medication or on how much to take. One time in four, they get advice on how long to continue taking the drugs prescribed. Those patronizing independent drugstores get advice more frequently—about half the time.

Supermarket pharmacies are being assigned advantageous locations in large, high traffic new stores. To fulfill their potential they're obviously going to have to reach out beyond their younger, price-conscious constituency. The statistics in this survey suggest that the way to make that leap may well be building and promoting better pharmacist-patient relations. ■

WHERE THE NUMBERS COME FROM

Each year, as part of an ongoing program to explore the major issues affecting the pharmacy profession, Schering Laboratories, Kenilworth, N.J., sponsors a major research study. The copyrighted numbers presented here are based on the most recent study, "The Forgetful Patient: The High Cost of Improper Patient Compliance," and are made available to SUPERMARKET BUSINESS for this article. For further information about this report and other Schering Pharmacy Affairs programs, write to Jack Robbins, Ph.D., Director, Pharmacy Affairs, Schering Corp. Kenilworth, N.J. 07033.

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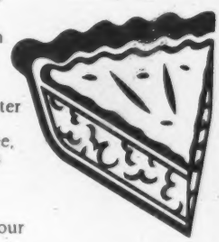

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SAMI UPDATE

All HBA Product Groups Share in Strong November Showing

Twenty-eight day unit sales advance paced by first aid, hair care needs and oral hygiene products.

BY ALAN B. MILLER, JR.

During the four weeks ending Dec. 4, 1987, total unit sales in all categories of health and beauty aids tracked by SAMI advanced 3.6 percent over the level in the same period a year ago. This increase was higher than the unit sales gain in any of the other four SAMI product departments and represented the highest growth rate since the 4.1 percent hike recorded back in March of 1987. The four-week gain in dollars amounted to 6.9 percent, an amount approached only by the 5.4 percent dollar growth among frozen foods. As the year was winding to a close, the annual increase in dollars for health and beauty aids stood at 5.2 percent.

Each of the eight product groups of health and beauty aids shared in the sales vitality for the department as a whole (see chart on page 69 for category figures). The leading contributor to the strength of the entire HBA universe had been skin care aids in recent months, but during the most recent four-week span, the highest rate of advance was found among first aid products (+6.4 percent), followed by hair care needs (+6.1 percent) and oral hygiene (+5.7 percent).

The growth rate for skin care aids this time around was just 3.7 percent, down substantially from the double-digit growth rates that have been prevailing. The smallest growth rates on a product group measurement basis was the +0.7 percent trend for baby needs.

As a result of the 11.5 percent improvement in the baby oils, cream and lotions category for the Dec. 4 reporting period, the sharp losses amounting to 12.1 percent for baby powders and 23.3 percent for infant clothes were erased in this product group as a whole.

As was true in the preceding period, there are two categories of personal deodorants that exhibit negative trends— sprays and creams, both of which continue to be cannibalized as a result of the continuing strength among sticks. As a result of new line extensions, unit volume of deodorant and talcum powders is showing continued expansion and the current four-week gain is a hearty 22.6 percent surge. There has also been a strong advance in the movement of foot deodorants and athlete's foot remedies and lesser gain rates for both feminine hygiene deodorants and douches and washes. The entire product group has improved 3.0 percent in unit sales on a 52-week basis, with stick deodorants and pads leading the way with a jump of 10.2 percent.

Both categories of first aid items are on the rise. The most recent four-week advance among first aid products (bandages, cotton swabs, gauze and the like) amounted to 5.9 percent and was enough to cause an annual gain rate for this category after a number of periods of losses. The 8.3 percent gain among first aid antiseptics was consistent with the 8.6 percent gain on a 12-week basis and the 7.8 percent upward trend for the full year.

Rebound in hair care

In the four-week period preceding this one, five categories in the hair care needs product group registered losses. In the December reporting period, there was only one category in the negative column— hair dressing needs, which showed a loss of 1.6 percent, but even this was an improvement over the 4.0 percent annual loss rate among these primarily male and ethnic hair-grooming products.

Consistent with recent trends, four-week sales of hair sprays remained vigorous,

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SAMI UPDATE

jumping 18.7 percent in unit volume through food stores. The four categories of hair care needs that moved from red into black ink between periods were shampoo (plus 9,000 units or less than a tenth of a percent), hair conditioning rinses (up 7.5 percent contrasted with a small loss annually), home permanent kits (a gain of 0.1 percent versus a 52-week loss of 8.4 percent) and hair coloring (moving ahead 5.3 percent—a marked improvement over the loss rate of 4.4 percent in the preceding period). The product group, as a whole, gained 6.1 percent, its best performance of the year.

Oral hygiene gains

Four of the seven oral hygiene categories tracked by SAMI had four-week unit volume gains. The three that remain on the loss side of the ledger are denture cleaners (-2.9 percent), denture adhesives (-0.5 percent) and toothbrushes (-1.9 percent). Of these three only one category—toothbrushes—shows an annual rate of gain (+0.8 percent).

The hottest category in the oral hygiene group remains mouthwash, which benefits both from new anti-plaque product activity as well as new line extensions such as Scope's peppermint flavor. Toothpaste unit sales achieved a gain rate of 2.5 percent, which compares favorably with the loss of 0.3 percent for the most recent 12 weeks and a gain of only half a percentage point for the year.

Dental aids, which include floss and appliances such as Water Pik and Orapik, managed a 12.1 percent gain. The small volume breath freshener items were able to record a plus amounting to 3.2 percent for the four-week period. The 5.7 percent gain for the product group as a whole was its best performance during the entire 1987 year.

Out of the fourteen categories of proprietary remedies tracked by SAMI, there were only three with reduced unit movement during the December period. All three of these are related to cough and cold miseries: internal analgesics (-1.8 percent), chest rubs (-2.7 percent) and cough remedies (-3.1 percent). The other two categories of products for respiratory problems—cold remedies and nasal spray/drops/inhalers— were able to maintain positive trends of 1.8 percent and 5.3 percent respectively.

There were three categories of proprietary remedies registering advances in the double-digit range: sleeping aids (+19.9 percent), eye care products (+16.0 percent) and appetite suppressants (+10.0 percent). Vitamins, both synthetic (+5.0 percent) and natural, along with minerals and supplements (+2.8 percent) made forward progress as did laxatives and stool softeners (+5.3 percent). The growth in the entire product group, however, was only 1.1 percent because of the losses in such high-volume categories as internal analgesics and cold remedies.

Smooth shaving

For the first time in 1987, all five categories of shaving needs were ahead of four-week volume recorded a year ago. The only category in this universe with an annual gain rate, however, was shaving creams, with a 1.0 percent increase. Gains ranging from 3.0 to 4.0 percent were realized by pre-shave lotions, after shave lotions and razor blades. The gain for razor sets was only 0.1 percent.

The skin care needs product group gain was modest (+3.7 percent) in comparison with consistent performance earlier in the year. On an annual basis, the only category among the five tracked by SAMI with a negative trend was facial preparations (-6.7 percent). This category shows continuing weakness reflecting a loss of 4.3 percent for the four weeks.

For the first time in more than a year, there was a loss for lip care products, as volume for some of the Chapstick and Vaseline line extensions has stabilized. Category volume fell 4.4 percent during the month in marked contrast with the 12.0 percent hike in annual unit food store volume. The loss of 21.4 percent for suntan lotion/suntan oil is inconsequential since it comes during the November off-season period.

Continued on page 69

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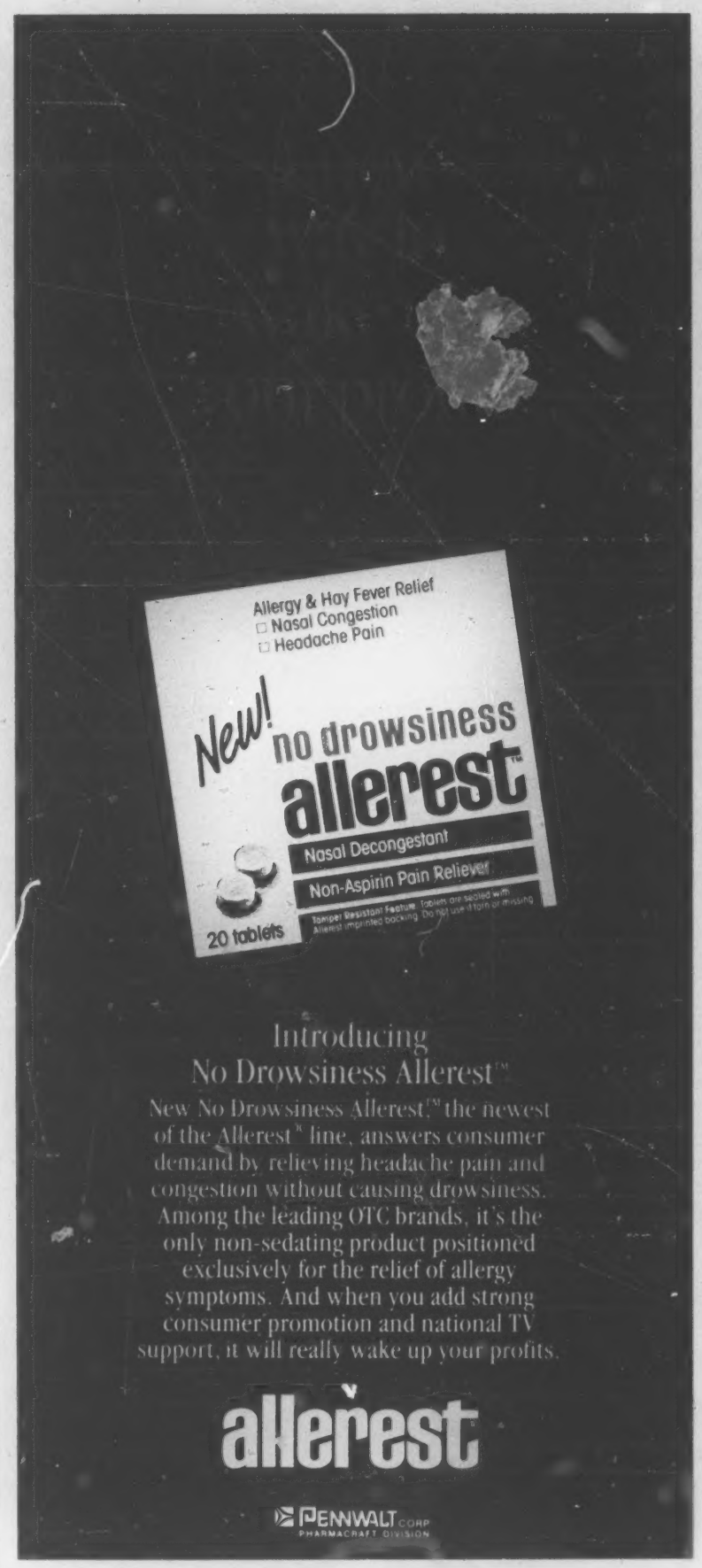
SAMI UPDATE

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 10/9/87	4 WEEKS ENDING 11/6/87	4 WEEKS ENDING 12/4/87
BABY NEEDS			
Baby Powders	−16.4	− 7.0	−12.1
Baby Oils, Creams & Lotions	+13.2	+22.1	+11.5
Infant Clothes	−25.3	−24.5	−23.3
Nursing Supplies	+ 2.5	+ 2.1	+ 1.7
DEODORANTS			
Sprays	− 1.2	− 6.2	− 8.7
Roll-Ons	− 0.2	+ 3.1	+ 1.4
Stick Deodorants & Pads	+14.5	+10.2	+ 7.6
Creams	−12.6	−11.0	−13.5
Deodorants & Talcum Powders	+15.5	+15.1	+22.6
Feminine Hygiene Deodorants	+ 3.3	+ 0.6	+ 5.4
Foot Deodorants & Athlete's Foot Remedies	− 1.5	+10.3	+11.3
Feminine Douches	+11.6	+ 9.5	+ 6.1
FIRST AID			
Antiseptics	+11.8	+ 5.4	+ 8.3
First Aid Products	− 0.4	+ 6.8	+ 5.9
HAIR CARE NEEDS			
Shampoos	− 2.9	− 6.3	0.0
Hair Sprays	+14.4	+20.0	+18.7
Hair Conditioning Rinses	+ 0.5	− 0.6	+ 7.5
Hair Setting Needs	+ 9.0	+ 3.9	+ 7.8
Home Permanent Kits	− 7.7	− 9.7	+ 0.1
Hair Coloring	− 4.8	− 4.4	+ 5.3
Hair Dressing Needs	− 2.2	− 4.1	− 1.6
ORAL HYGIENE			
Toothpastes & Powders	+ 0.1	− 3.3	+ 2.5
Mouthwashes	+10.5	+18.9	+25.0
Breath Fresheners	− 1.7	− 2.2	+ 3.2
Denture Cleaners	− 4.7	− 2.5	− 2.9
Denture Adhesives	+ 9.7	− 1.1	− 0.5
Toothbrushes	−11.0	− 3.1	− 1.9
Dental Aids	—	+27.1	+12.1
PROPRIETARY REMEDIES			
Antacids	+ 7.0	+ 2.3	+ 2.7
Internal Analgesics	+ 0.3	− 8.2	− 1.8
External Analgesics	+ 7.0	− 3.3	+ 1.4
Cold Remedies	+ 6.7	+12.4	+ 1.8
Nasal Sprays—Drops—Inhalers	+ 3.7	+ 9.3	+ 5.3
Chest Rubs	− 4.6	+ 1.8	− 2.7
Cough Remedies	+ 4.5	+ 4.3	− 3.1
Laxatives	+ 6.4	+ 2.0	+ 5.3
Sleeping Aids	+ 7.2	+16.2	+19.9
Tranquilizers	− 0.4	+10.1	+ 2.5
Synthetic Vitamins	− 2.3	+ 3.5	+ 5.0
Eye Care Products	+19.0	+13.9	+16.0
Appetite Suppressants	− 1.6	+12.2	+10.0
SHAVING NEEDS			
Shaving Creams	+ 5.7	+ 4.7	+ 9.3
Pre-Shave Lotions	+ 0.6	− 0.8	+ 3.6
After-Shave Lotions	+ 1.2	− 3.0	+ 3.1
Razor Blades	− 4.2	− 1.6	+ 3.0
Razors & Blades	−25.8	−11.4	+ 0.1
SKIN CARE AIDS			
Hand & Body Creams & Lotions	+32.9	+22.7	+13.2
Facial Preparations	+ 1.0	− 4.7	− 4.3
Lip Care Products	+38.5	+16.9	− 4.4
Suntan Lotions & Oils	+10.1	+ 2.7	−21.4
Cosmetic & Medicated Skin Aids	+10.5	+ 6.2	+ 5.1
TOTAL ALL CATEGORIES			


Allergy & Hay Fever Relief
□ Nasal Congestion
□ Headache Pain
New!
no drowsiness
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Nasal Decongestant
Non-Aspirin Pain Reliever
20 tablets
Introducing
No Drowsiness Allerest™
New No Drowsiness Allerest,™ the newest of the Allerest® line, answers consumer demand by relieving headache pain and congestion without causing drowsiness. Among the leading OTC brands, it's the only non-sedating product positioned exclusively for the relief of allergy symptoms. And when you add strong consumer promotion and national TV support, it will really wake up your profits.
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